

ROLLOVER ACCEPTANCE REQUEST

Pursuant to Indiana Code Section 5-10.2-3-10 and to the extent permitted by the Internal Revenue Code and the applicable regulations, the Indiana Teachers' Retirement Fund, on behalf of any active member, will accept a rollover distribution into a rollover account from any of the following:

- (1) A qualified plan described in Section 401(a) or Section 403(a) of the Internal Revenue Code.
- (2) An annuity contract or account described in Section 403(b) of the Internal Revenue Code.
- (3) An eligible plan maintained by a state, a political subdivision of a state, or an agency or instrumentality of a state or political subdivision of a state under Section 457(b) of the Internal Revenue Code.
- (4) An individual retirement account or annuity described in Section 408(a) or Section 408(b) of the Internal Revenue Code.

The rollover account is maintained separate from the member's annuity savings account (ASA) and can be invested in any of the Fund's alternative investment options, but not in the Guaranteed Fund.

A member may withdraw the member's rollover account from the fund in a lump sum at any time before retirement. At retirement, the member may withdraw the member's rollover account in accordance with the retirement options that are available for the member's annuity savings account, including the deferral of a withdrawal.

The Indiana Teachers' Retirement Fund is a qualified governmental retirement plan as described in Section 401(a) of the Internal Revenue Code. A copy of the Fund's Qualification Letter is available for inspection upon request.

Please make checks payable to:

Indiana State Teachers' Retirement Fund FBO (Member's Name)
150 West Market Street, Suite 300
Indianapolis, IN 46204-2809

The signature below by the Indiana Teachers' Retirement Fund Member certifies and acknowledges the Member's agreement to transfer the Member's qualified plan, account, or annuity to the Indiana State Teachers' Retirement Fund and allocate those funds as indicated on the Investment Allocation Form provided by the Fund. If an Investment Allocation Form is not received, the fund will be placed in the Money Market Fund by default until TRF receives an Investment Allocation Form from the member.

Signature of Member

Printed Name of Member

Date

Member's Social Security Number